WORKFORCE SOLUTIONS

FOR TARRANT COUNTY

BOARD ISSUANCE **Policy**	**ID/NO:** OP40-06, **Change 1** **DATE: 10-01-07**

To: TCWDB Staff
Workforce Center Contractor
CCMS Contractor
Sub-Contractors

From: Judy McDonald, Executive Director

Subject: Center Hub and Sub-Contractor Interaction Guidance

PURPOSE: To provide the Center "Hub" Contractor and the other sub-contractors **of changes** to Board guidance regarding their interactions with each other. **All changes are bolded.**

AUTHORITY: The 74th Texas Legislative Session, in H.B. 1863, placed the oversight, funding, administration and monitoring functions of area Workforce Centers and programs under the purview of Local Workforce Development Boards. Tarrant County Workforce Development Board (TCWDB) known as Workforce Solutions for Tarrant County, has program administration, planning, monitoring and fiscal oversight of Child Care Funds, Food Stamps Employment and Training Program, Workforce Investment Act, and TANF *Choices* Program.

BACKGROUND: The Tarrant County Board has designated a multiple provider system with the operator holding the Center contract as the "hub" of the system. As the "hub", the Center Operator has the responsibility to be the single point of eligibility determination, and report all client activity through The Workforce Information System of Texas (TWIST). The community and faith-based contractors have the responsibility to maintain and provide the center with the appropriate documentation in a timely manner as described under the special conditions of their contract. To further clarify this relationship, the Board has developed a Center Hub/Community Contractor Procedural Guide that is attached.

PROCEDURES: The Hub and **Community** Contractors should review the attached information and incorporate it into their daily interactions.

ACTION REQUIRED: The Center Operator and the community contractors of the Board are required to read and follow the procedures put forth in the attached procedure manual.

INQUIRIES: If you have any questions regarding this policy, please contract your Lead or Center Manager.

EFFECTIVE DATE: 10-01-07

FBCO's **funding source(s)** for those persons determined eligible. This may be transmitted by fax, e-mail or in person.
The FBCO is responsible to file all such eligibility documentation in **the** client case file retained on-site at the FBCO location.
NOTE: The FBCO is not to serve any customers without hard copy verification of their eligibility AND enrollment in the workforce center program corresponding to their funding source. **Failure to adhere to this point may result in disallowed cost and monitoring errors.**

Ongoing Eligibility Determination: **All** programs require on-going **proof of** eligibility **and enrollment on a monthly basis.** It is the responsibility of the FBCO to make a request **for monthly verification of eligibility and enrollment**, in writing **to the liaison**, by providing the names and Social Security Numbers of all individuals the FBCO plans to continue to serve the following month. This request is to be made by the FBCO to the liaison within 5 calendar days following the HHSC cut-off date **for eligibility and enrollment documents** for the following month. Once in receipt of the request, it is the liaison's responsibility to provide hard-copy documentation of ongoing eligibility **and enrollment,** for those persons requested, to the FBCO on or before the last day of the current month for the following month's eligibility. The liaison is also responsible to review each customer's eligibility **and enrollment documents** with the FBCO either in person or via phone conversation.

Tracking & Reporting: Community Contractors are responsible to **complete all** data entry **of** all participation hours for their customers into the **appropriate data system (either** Safety Network **or TWIST**) no later than 5:00 pm each Wednesday for the previous week's activities. Hours entered in**to any data system** should originate from a "source document" (sign-in sheet, log book, etc.) which is maintained on-site at the FBCO location. This source document should contain the signature of a person authorized to verify its accuracy (instructor, case manager, supervisor, etc).
For hours entered into the Safety Network, **a** report **of all hours should** be run at 5:00 pm each Wednesday **by the** liaison **and entered into TWIST** no later than 5:00 pm on Friday of the **same** week. The liaison should provide a copy of the Service Tracking Participation screen in TWIST to the FBCO for each client served by the FBCO at the end of each month showing all hours **transferred** into TWIST **from Safety Net** for that month. The FBCO should compare the source document to the Safety Net entry and the TWIST entry to insure that all data was transferred correctly. These 3 data items should match. The Service Tracking Participation screens should be **filed in the customer's folder** by the FBCO for monitoring purposes.

In addition, it is the responsibility of the FBCO supervisor to read and review at least 3 case files each month on each worker handling cases. A summary report and trends analysis of these case readings should be submitted to the **appropriate** Board **contract manager** each month with the monthly report. A written corrective action plan should be put in place where errors are found. This corrective action plan should be maintained onsite at the FBCO for review by the Board **and/or appropriate** monitors.

Coordination of Services: It is the responsibility of the **workforce** center liaison to schedule time each month (bi-**weekly** is recommended) to meet and discuss coordination, address any issues, ask questions, **review eligibility and enrollment status** and staff customer cases.

Duties of a Liaison: The following are the listed duties of a **Workforce** Center Liaison:

1. Learn your assigned contractor's program(s). Know their services, their funding source**(s)**, their staff & their facility. Be **knowledgeable enough about their** program**(s) to explain it to customers, other workforce center staff, and the community**.
2. **Be available to the community contractor to answer questions, provide clarification on rules, regulations, eligibility, or other questions they may have.**

Procedures for the Coordination of Services between Community Contractors and the Career Center Contractor

(The following procedures affect all Adult Innovative Initiative Contractors and their interactions with the **Workforce** Center Contractor)

Overall Goals:

1. **To insure that all customers served by a community contractor are eligible for and enrolled in the workforce program(s) corresponding with their funding source; thereby avoiding disallowed costs and monitoring errors.**
2. **To insure that all hours produced through a community contractor's program(s) are accounted for and recorded in the TWIST system.**
3. **To provide the center contractor and community contractors with an organized procedure and flow for referring and serving mutual customers.**

Initial Intake: **For customers originating** at the community contractor (herein **also** referred to as FBCO) **and to whom the FBCO would like to provide services**, the FBCO will collect demographic data on the customer and complete initial screening for possible eligibility. The FBCO will **notify the workforce center liaison of** the customer(s)' name(s) and Social Security Number(s) within two (2) business days of the FBCO's initial meeting with the customer. This **notification** should specifically request eligibility determination.
The **workforce** center liaison will determine customer eligibility under the funding stream(s) associated with the requesting FBCO. The **workforce** center liaison must respond in writing (which may include e-mail) to the requesting FBCO within five (5) business days on the eligibility status for the customer(s) requested under any funding streams associated with that FBCO. All final eligibility decisions rest with the **workforce** center. The FBCO's do not ever determine final eligibility. **In addition, the FBCO shall not expend any program funds (including staff time) on a customer until eligibility and enrollment documents affirming the customer's eligibility and enrollment in the workforce program corresponding to their funding source(s) are received from the center contractor.** The FBCO is responsible to notify the customer that a face-to-face meeting **with the workforce center** is necessary **prior to receiving their service(s) funded by Workforce**. It is then the customer's responsibility to call or visit the **workforce** center to initiate this face-to-face meeting.

Face-to-Face Interviews: **Once in receipt of the notification from the FBCO,** the **workforce** center liaison will check TWIST to see if a case already exists for any program. A face-to-face interview with the customer by an employee of the **workforce** center MUST occur prior to expending any program funds (including staff time) other than what is necessary for eligibility determination on a customer under any categorical program.
The **workforce** center contractor is responsible to **make appropriate** document**ation** of the face-to-face interview, determine eligibility and open a TWIST case for any appropriate program(s) **for which the customer is eligible**. If a customer fails to initiate contact with the **workforce** center within the five (5) day time frame, the **workforce** center will respond "ineligible due to no contact" to the requesting FBCO.
This would be the first step for customers originating at the workforce center. The workforce center may refer customers out to community contractors once this has occurred. It is requested that when a referral is made to a community contractor, the referring workforce center staff send the documentation listed in the following section to the FBCO at the time the customer is referred.

Documentation & Notification of Eligibility and Enrollment Process: Once the face-to-face interview process is completed, the **workforce** center contractor must within 24 hours provide hard-copy documentation (TWIST Screen and/or SAVERR or TIERS Screen) showing the customer(s)' eligibility and enrollment in **any** appropriate program(s) **corresponding** to the

3. Receive the list of client names and Social Security Numbers from your assigned community contractor each month **(**within 5 days following HHSC cut-off**)** and pull eligibility **and enrollment** documents (SAVERR, TIERS, TWIST screens) for each person listed.
4. Return the eligibility **and enrollment** documents to the community contractor prior to the last day of the month.
5. **Meet** with the contractor and review each of the eligibility **and enrollment** documents to ensure that the contractor is clear on who is eligible and who is not for the following month.
6. **Pull** the Safety Net weekly report on your assigned contractor each week and enter the hours for your contractor's clients into TWIST.
7. Assist the contractor in marketing their program to the various Workforce Centers by way of flyers, e-mail, staff meetings, & dissemination of information about their program.
8. Meet with and communicate with your assigned contractor in person at **least** monthly (bi-weekly is recommended) to address coordination issues. **A summary of these meetings should be** provided to your Center Manager, and board **contract manager**.